



June 2011

**Missouri Department of Health and Senior Services  
Bureau of WIC & Nutrition Services**

# **Self-Paced Clerical Training Module**

**Required to be completed by all trainees.**

This institution is an equal opportunity provider.

## **Purpose of Module**

The purpose of the Clerical Module is to acquaint the new employee (herein after referred to as trainee) with the policies and procedures of the WIC Program by completing training on-the-job (OJT).

This self-paced module will guide you through the steps necessary to gain skills needed in order to function as a WIC clerk and as the foundation for other WIC positions:

1. Background information about the WIC Program;
2. Services the program provides; and
3. Your role in assisting the applicant/participant during their time with the Missouri WIC program.

If you have questions during your training do not hesitate to call me. This module contains a wealth of information you may need to refer to from time to time. It is recommended you keep it in a binder for future reference.

Sincerely,  
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## **Training Requirements**

All new employees are required to complete the clerical training. The OJT clerical trainee will complete the self paced module and activities **within 6 months** from the date of hire. The self-paced module is also intended for use as "refresher" training for current staff or staff returning from a break in service over 1 year.

## **Materials Needed**

Trainee will need access to the following:

- The WIC Operations Manual (WOM)
- MOWINS (Missouri WIC Information Network System)

## **Instructions for On-the-Job Clerical Training**

1. Read the Clerical Self-Paced module.
2. Complete all the hands-on activities at your local agency.
3. Once the State WIC Nutrition trainer receives the "Verification of Completion" letter from the trainee's supervisor a "Certificate of Completion" will be issued to the trainee.

## **Learning Objectives**

Upon completing this module, the trainee should:

1. Have knowledge of rapport building and cultural awareness.
2. Have knowledge of effective communication techniques for individuals who speak little or no English.
3. Have knowledge of collecting and entering the demographics and income information in the Missouri WIC Information Network System (MOWINS).
4. Have knowledge of VOC (Verification of Certification) and how it is used for out-of-state eligible participants.
5. Have knowledge of the nutrition assessment forms used in the Missouri WIC program.
6. Have knowledge of Schedule for Certifications for program categorically eligible participants.
7. Be able to issue food instruments (FIs) in accordance with State policy.
8. Be able to instruct participants on food instrument issuance/redemption procedures.
9. Be able to explain program eligibility requirements and participant's rights and obligations.
10. Be able to inform participants about the benefits and services of the WIC Program.
11. Be able to schedule participants for individual or group education and counseling.
12. Be able to refer to appropriate social, health and/or nutrition services within the community.

## **Rapport Building**

Rapport is the foundation for any relationship and can be learned to assist WIC staff in discussing and solving difficult issues. Rapport happens at many levels.

For starters, these are some of the ways to begin building rapport:

- Take a genuine interest in getting to know what's important to the other person. Start to understand them rather than expecting them to understand you first.
- Pick up on the key words, favorite phrases and ways of speaking that someone uses and build these subtly into your own conversation.
- Notice how someone likes to handle information. Do they like lots of details or just the big picture? As you speak, provide information back in this same portion size.
- Breathe in unison with them.
- Look for the other person's intention — their underlying goal — rather than what they do or say. They may not always get it right, but expect their heart to lie in the right place.
- Adopt a similar stance in terms of body language, gestures, voice tone and speed.
- Respect the other person's time, energy, friends and money. These will be important resources for them.
- Listen to people and avoid making judgments.
- Exhibited behavior might have different meaning in different cultures.
- Do not assume everyone is alike.
- Communicate with the other party.

## **Examples of Potential Differences in Cross-cultural Values**

1. WIC participants and counselors may differ on the value of time. If “being on time” and “not wasting time” are not familiar concepts to the participant, a 10:00 a.m. appointment may not be kept until 11:00 a.m. or 12:00 p.m., and the participant will consider this entirely appropriate behavior.
2. The idea of receiving WIC food that should not be shared with other family members but must be consumed by the participant alone may be incomprehensible if the participant is from a culture where the group’s welfare is always placed before the individual’s.
3. A participant may not follow the dietary practices suggested because of family values and practices. Decisions regarding food intake might be decided by the group or family consensus and not the individual’s decision.
4. A participant may not understand that his/her health habits are related to their well being, but may attribute ill health to “God’s will.” Thus, prevention may be viewed as a useless attempt to control one’s fate.

## **Variety of Ethnic Food Practices with Nutrition Education Suggestions**

<b>Ethnic Group</b>	<b>Traditional Food Practices</b>	<b>Typical Foods</b>
<b>African American</b>	Food preparation includes frying, barbecuing, foods with gravy and sauces, home-baked cakes and pies	Collard greens and other leafy green and yellow vegetables, legumes, beans, rice, and potatoes
<b>Asian</b>  There are very diverse cultures within the Asian region therefore it is important to address specific individual cultural customs in nutrition education sessions	Food preparation includes stir-frying, barbecuing, deep-frying, boiling and steaming; emphasis on rice and vegetables, relatively little meat  Low consumption of milk during pregnancy and lactation with no increase in caloric intake; rice gruel (rice flour and water) fed to breastfed infants as early as one month and often the only food served for the first year	Rice eaten at most meals, low dairy intake; fish, pork and poultry are main protein sources; high vegetable and fruit intake
<b>Vietnamese</b>	Little use of oil/fat when frying foods  Three meals per day with some snacking on soups and fruit	Dry, flaky rice supplemented with vegetables, eggs and small amounts of meat and fish, use of NuocMam (fish sauce) in most traditional dishes; hot green tea and coffee (plain); bananas, mangoes, oranges, papayas, coconuts, pineapple
<b>Hmong</b>  (from rural mountain areas in Laos)	Three meals per day with no snacking; communal style meals  Minimal dairy, fat and sugar intake in diet; cooking methods include stir-frying, boiling, steaming and roasting (open fire)  Low consumption of milk during pregnancy and lactation with no increase in caloric intake; rice gruel (rice flour and water) fed to breastfed infants as early as one month and often the only food served for the first year	White rice is the staple food with vegetables, fish, meat and traditional spices (hot peppers, ginger, garlic, coriander, coconut, and lemongrass)
<b>Middle Eastern</b>  There are very diverse cultures within the Middle East region; therefore, it is important to address specific individual cultural customs in nutrition education sessions	Food prep includes grilling, frying, grinding and stewing meats; common spices include dill, garlic, mint, cinnamon, oregano, parsley and pepper; olive oil is preferred	Dates, olives, wheat, rice, legumes, lamb and bread; primarily fermented dairy products such as yogurt and cheese; legumes used in many dishes  Muslims do not eat pork and do not drink alcohol or eat food prepared with alcohol  Jewish people do not eat pork and may follow Kosher dietary practices

Ethnic Group	Traditional Food Practices	Typical Foods
<b>Puerto Rican</b>	<p>Diet high in calories, complex carbohydrates, fats and sodium</p> <p>Puerto Rican diet highly Americanized to include pizza, hot dogs, canned spaghetti, cold cereal, and canned soups</p> <p>Breastfeeding is common</p>	<p>Rice, beans, legumes; some milk/calcium products; chicken, pork sausage, turkey, beef, pork chops, spare ribs, marinated pork, some fish; starchy vegetables; lettuce salads with tomato</p> <p>Seasonings include Sazon (high in MSG), annatto, cilantro, sofrito</p>
<b>Mexican-American</b>	<p>Frying of foods increases fat content of diet</p> <p>Four or five meals daily</p> <p>Mexican-Americans often use infant formula with little weaning from bottle at age of one; baby bottle tooth decay common in toddlers</p>	<p>Typical diet high in complex carbohydrates such as beans, rice, corn/corn products and bread; adequate protein from beans, eggs, fish, beef, pork, poultry, and goat</p>
<b>Native American</b>	<p>Often do not eat breakfast</p> <p>Food preparation often involves frying, and use of high fat/high sodium fast foods, prepared foods, snacks and desserts are common; additional fat, sugar and calories added to diet with butter, margarine, mayo, luncheon meats and soda.</p>	<p>Meat or meat-based main dish, potato, macaroni and bread; common vegetables include peas, corn, green beans, mixed vegetables, iceberg lettuce, winter squash (in season), cabbage, turnips, onions, potatoes; common fruits include oranges, apples, bananas, fruit cocktail, canned fruits</p>

Source: Ohio State University Extension Fact Sheets, Cultural Diversity: Eating in America @ <http://ohioline.osu.edu/hyg-fact/5000/5230.html>

## **Effective Communication Guidelines for Individuals Who Speak Little or No English**

### **1. Start with a welcoming tone.**

Greet participants in their native language and ask them to pronounce their names. Set a positive tone and convey your willingness to communicate clearly despite linguistic differences.

### **2. Find out how well the individual understands the English language.**

Consider use of interpreter or translated materials to improve understanding.

### **3. Speak clearly and concentrate on the most important message.**

Determine exactly what you want to say and then carefully choose the words to say it. Speak at a slower pace, pausing for a couple of seconds after you ask a question or give new information. Use phrases or short sentences and keep technical jargon to a minimum. Include the full form of words rather than contractions (e.g., "I will" instead of "I'll"). Do not speak louder because to a participant who has limited English this may come across as anger, and does nothing to improve communication.

### **4. Introduce manageable amounts of new information.**

Focus on the essential skills, behavior and knowledge a participant needs to know rather than a lot of background information. Present limited amount of information at each session, allowing the person to build on what she already knows when new information is provided at future sessions.

**5. Supplement the spoken word.**

Use simple line drawings and diagrams to help communicate your message. Demonstrate what you mean through gestures or pantomime and encourage the participant to do likewise. Be sensitive to the fact that gestures can sometimes be misunderstood. Observe the participant's responses; you can often learn a lot from nonverbal cues.

**6. Verify the participant's understanding.**

Don't assume that a nod and a smile mean the message was understood. To verify, ask the patient an open-ended question rather than a yes/no question. Clarify any misunderstanding by finding new and simple ways to say the same thing.

Source: Osborne H. *Overcoming Communication Barriers in Patient Education*. Gaithersburg, Maryland: Aspen Publishers, Inc; 2001.

**Applicant Requests WIC Services**

The certification process will begin when a categorically eligible applicant (first time applicant who is a Prenatal, Breastfeeding woman, Non-Breastfeeding woman, Infant, or Child up to their 5th birthday) makes a request in person or by phone. Applicants or participants have the option to be served by the local agency they choose, regardless of the service area in which they live or work. The local agency shall serve applicants or participants who reside outside their service area. Missouri WIC utilizes MOWINS (Missouri WIC Information Network System) as the electronic data collection and retrieval system to provide immediate and important information for use at the local and state levels.

When someone requests services by telephone or in person the agency shall determine the following:

1. Categorical eligibility? (Prenatals, Breastfeeding women, Non-Breastfeeding women, Infants, Children up to their 5th birthday)
  - a. If not categorically eligible no appointment is needed.
  - b. If categorically eligible, ask the applicant how many members are in the household.
2. Complete a "state wide search" in MOWINS to see if the applicant/participant has ever participated in Missouri WIC in the past or present. After the appropriate record is located or is initially created, the WIC clerical staff member will gather mostly demographic information from the client. This exchange may take place during a telephone call or in person with the client. The system performs the same way whether the client is an applicant or a participant, except where explicitly noted in the documentation.
  - a. If a record is found, update the demographic information.
  - b. If no record is found, complete a Prescreening in MOWINS.

The Participant List Window is the main dialog for accessing all functions within the Clinic application. The first step is to identify the participant and/or household group with which the WIC staff member will work. The Clinic application provides the Participant List functions to assist the user in locating the desired participant record.

LWP Clerical staff shall search for an applicant/participant using any of the following:

- State WIC ID – each participant is assigned a number by the system which is used to access the participant record.
- Household ID - is a number used to access all members of the household in the system.
- Demographic - when the Demographics radio button is selected, an entry

can be made for one of the following: Last Name, first name, middle initial or date of birth of the applicant/participant.

➤ Departmental Client Numbers (DCNs) -

The Departmental Client Number (hereafter referred to as DCN) is a numbering system used by the Department of Social Services and Department of Health and Senior Services to identify persons participating in government-sponsored health and/or assistance programs.

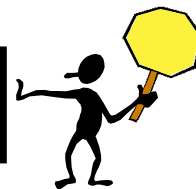
If the applicant cannot be assessed for program eligibility on the day initial contact is made, the LWP shall record demographic information using the Applicant Prescreening screen in MOWINS. It is recommended that the income information be collected at the same time. If the applicant does not meet the income eligibility guidelines, the LWP shall inform the applicant and make no appointment.

### **Prescreening Applicants**

The Applicant Prescreening dialog allows the user to enter the information gathered during prescreening for all NEW APPLICANTS. Prescreening is not used for participants who are already in the system (currently or in the past). The information gathered during prescreening updates the demographic record for the applicant. Only pertinent data elements are present on the Applicant Prescreening dialog.

The purpose of Applicant Prescreening is to: get information about a family and individual, screen out possible applicants who would not qualify for WIC, create a partial WIC record, and set up an appointment for the applicant.

Stop and observe a staff member completing a prescreening on an applicant.



3. Gather the applicant's income (gross before deductions) for the household.
  - a. Compare household income to the Missouri income guidelines.
  - b. If applicant meets the income guidelines, proceed to step #4.
  - c. If not income eligible, ask if they participate in any of the following programs:
    - Missouri Health Net (formerly Medicaid),
    - Temporary Assistance for Needy Families (TANF),
    - Temporary Missouri Health Net (prenatal only),
    - Supplemental Nutrition Assistance Program (SNAP) (formerly Food Stamps)
  - d. If they participate in any of the above programs proceed to step #4. If participant does not meet the Missouri income guidelines or participate in any government sponsored programs then the applicant/participant is not eligible for the WIC program.

- When a participant with the right to a fair hearing is found ineligible for program benefit at any time during the certification period, the participant must be notified in writing, using the Official Notification including reason for termination and right to a fair hearing, not less than 15 days before termination of eligibility. Refer to ER# 3.02000.
- The LWP does not need to give written notification of ineligibility to applicants whose income has been assessed over the telephone, or when the individual does not have the right to a fair hearing (i.e. no longer categorically eligible, client request to be terminated from the program, or no show).

Income assessment is completed when the applicant or participant arrives for their appointment. After meeting categorical eligibility, the applicant/participant must have their income assessed to determine if they meet the financial guidelines. Income assessment should take place prior to the health assessment portion of the certification process. WIC staff should not spend time on the health assessment if the applicant/participant is not income eligible.

For the purpose of income assessment, the words household, family, and economic unit can be used interchangeably to refer to a person or number of persons who usually live together (although not necessarily) and share economic resources and consumption of goods or services. To be a household, a family or individual must have its own source of income.



Two separate families may reside in the same home if their production of income and consumption of goods, especially food, is not shared. Shelter received from another does not have to be considered in determining shared income, food and resources.

The Local WIC Provider shall deal with special circumstances regarding determination of economic unit.

- For instance, pregnant women (single birth pregnancy) will be counted as two persons in the economic unit.
- A foster child is considered a separate household from the foster family if the child remains the legal responsibility of a welfare or other agency. A foster child is considered a household size of one.
- Adopted child, divorced families, military personnel and students have additional criteria regarding determination of economic unit and “special circumstances” which are addressed in ER# 3.02000.

Proof of income is based on one of the following:

1. Adjunctively eligible through current participation of Missouri Health Net “Medicaid”, MC+, TANF, or Food Stamps. (Refer to ER# 3.02000)
2. Income for applicants and participants from all sources of household and economic unit not adjunctively eligible. (Refer to ER# 3.02000)

### **Determining Income:**

Income is gross cash income before any deductions including income taxes, employee's social security taxes, insurance premiums, retirement, and any other deductions, such as bonds or garnishments. No deductions from income are allowed, regardless of expenses or hardship.

Determine if current or annual income is the best indicator of eligibility for each applicant or participant.

- Current is income received the month or week prior to the application. For unemployed persons (including laid-off workers), income eligibility must be determined by their

current rate of income.

- Annual is income of the past twelve months.

The Local WIC Provider shall accept specific documentation as proof of income. Proof of income must be recorded in the system on the income screen. The local agency shall accept the following as appropriate documentation of income:

- Federal tax forms/W-2, fees and tips
- Check stubs or copy of check
- Statement of benefits/court awarded information/child support
- Signed statement by the employer, if paid in cash
- Financial information provided to the Immigration and Naturalization Service, for foreign students, resident alien or temporary alien status
- Copy of bank statement, interest income



Additional documents deemed acceptable are addressed in ER# 3.02000, "Income Assessment and Documentation". Also addressed in the policy is the procedure(s) if the applicant/participant fails to provide proof of income at their certification or recertification appointment.

### **Income Inclusions**

The Local WIC Provider shall include all income (as defined by federal regulations) collected from the applicant/participant when determining financial eligibility. Income is gross cash income before any deductions (specific deductions addressed in ER# 3.02000).

Some income examples include wages or salary, tips, social security benefits, unemployment compensation, alimony and/or child support received, withdrawal from savings or investments, loans that do not need to be repaid, and military housing allowance. A comprehensive list of income inclusions is addressed in ER# 3.02000.

### **Income Exclusions**

The Local WIC Provider shall not count as income anything that is excluded by federal regulations. Non-cash income or benefits will not be considered income by the WIC local agency. Some income exclusion examples include HUD rent subsidies, Food Stamps' value, Pell Grants, tax refunds, loans of any kind which must be repaid, basic allowance for housing received by a military family living in the United States, prescription drug discount card program, Federal and State tax refund, and earned income tax credit. A comprehensive list of income exclusions are addressed in ER# 3.02000.

### **Income Guidelines/Responsibilities: State Agency and Local WIC Providers**

Each year the WIC state agency will send all Local WIC Providers the new income guidelines, with the dates they are effective. The Local WIC Provider will use the income guidelines (refer to the Missouri WIC Income Guidelines) enclosed in your training packet to screen initial inquiries from applicants and to determine applicant/participant income eligibility for the program at all certification and recertification visits. These income guidelines are 185% of the federal poverty level. To be eligible, income must be no higher than the maximum amount shown for the family size.

The WIC state agency will supply the income guidelines in a permanent format to be used from April 1 through March 31 of the next year. The most current version available must be used when assessing income eligibility. The Local WIC Provider shall publish the specific income guidelines in their outreach efforts. Refer to Income Guidelines ER# 3.01200.

Stop and review the handout in Appendix A  
"Missouri WIC Income Guidelines."



### **Adjunct Income Eligibility**

The Local WIC Provider shall accept as adjunct income eligible all applicants or participants who prove they are eligible for the following programs:

- Missouri Health Net (formerly Medicaid),
- Temporary Assistance for Needy Families (TANF),
- Temporary Missouri Health Net (prenatal only),
- Supplemental Nutrition Assistance Program (SNAP) (formerly Food Stamps;
- Members of a household with a prenatal or infant eligible for Missouri Health Net.

The clerical staff must have access to verify in PROD that the participant is active and participating in a government sponsored program. Verification is completed by using the HDFS screen in PROD.



Stop: Check with your supervisor to see if you will need access  
to PROD. If so, has the ASAP form been completed?

SCLR is the first screen in a series which can lead to information about persons in the Department of Social Services. The information WIC is concerned with primarily is the DCN, the Departmental Common Number. The DCN is an eight digit number found on a client's Medicaid card or the food stamp card.

The DCN is the interdepartmental number electronically assigned to each client participating in programs within different state departments, in this case, DSS and Department of Health and Senior Services. The DCN can be assigned by either department. Therefore, it is very important to be sure all information is correct when assigning a DCN.

The DCN is always the same (it never changes). A client can have a DCN and be inactive for years and it will still be there. DCNs are not purged from the system. They do not change if a client's name changes or if they move.

Stop and observe a staff member verifying  
adjunct eligibility in PROD.



However, when an individual with adjunct eligibility is a foster child, adjunct eligibility is not conferred to other household members since a foster child is considered a family of one. An adjunctively eligible applicant or participant may self-declare income. Note this in the system by selecting the appropriate program(s) the participant is participating in. Any member of the household who is not adjunctively eligible must have their income assessed.

If a WIC participant has not had income verification because of adjunctive eligibility, and then he or she stops participating in the other program, the income must then be rechecked for WIC income eligibility. If at the time of reassessment one family member is determined not to be income eligible and terminated from the program all other participants in that family/economic unit are ineligible. Therefore, all participating family members must be terminated from the program.

4. Make an appointment within the time frames below for all new applicants:
  - Ten Days:  
Prenatal, infants under six months old, and members of a migrant population
  - Twenty Days:  
Infants over six months old, children (up to five years old), and Breastfeeding and Postpartum women
5. Inform the applicant/guardian that all categorical eligible individuals must be physically present at the scheduled certification appointment.
6. Inform the applicant/guardian to bring the proper proofs/documentation to their appointment:
  - Proof of income:
    - Federal tax forms/W-2's, check stubs or copy of check, statement of benefits/court awarded information/child support, signed statement by the employer if paid in cash.
  - Proof of identity:
    - For an infant or child - an immunization record, birth certificate, social service letter with identifying information, or hospital record (e.g. crib card, hospital band, discharge paper).
    - For an adult - a photo identity such as a driver's license, passport, employment ID card, school ID card, state ID card, military ID card, or naturalization record.
      - When a photo identity is not available, proof could be a card or letter verifying health care, social services, or voter registration from the named source.
  - Proof of residency: A current utility bill, or a rent or mortgage receipt for lodging/housing (within 30 days).



NOTE: The LWP shall attempt to contact all prenatal applicants who miss the first eligibility determination appointment within **five** calendar days of the original appointment. (Refer to ER# 3.01700).

## Certification Guided Script

The Certification Guided Script (CGS) is used to certify applicants and to recertify participants in the WIC program. The Certification Guided Script (CGS) window allows the user to view the steps that have been taken for the current certification attempt for the participant. It also allows the user to view current information. Refer to the WIC Clinic Training Manual page 106-110.

The links on the Certification Guided Script are displayed as follows:

**Certification Guided Script**

File Guided Script Help

Certification Guided Script

☒ Demographics ☐ Referrals/Other Programs

☐ Health Information ☐ Nutrition Education

☐ Height Weight and Blood ☐ Food Prescription

☐ Immunizations ☐ Create SOAP Notes

☐ VENA ☐ CPA Determined Follow-up

☐ Risk Factors/High Risk ☐ Issue Checks

Household Member Information

☐ High Risk

Issuance Bi-monthly

Education Bi-monthly

Education Method Group

Group Education BREASTFEEDING

Risk Factor	Description

**The clerical staff shall complete the following:**

The Demographic Information dialog contains three sub-tabs for collecting information about a participant. The sub tabs are Demographics, Additional Info 1 and Additional Info 2.

**GRETCHEN M. ADAMS - 43 weeks of Gestation WIC ID: 07202333 Household ID: 12883949**

File Participant Activities Check Management Help

Checks History Immunization Referrals Health Information Income History Appointments

Demographics HT/WT/Blood Diet Intake Risk Factors Food Prescription Nutrition Education

Last ADAMS First GRETCHEN MI M Birth Date 01/18/1983 Gender Female

Address 123 ANYSTREET WIC Category Pregnant

County HENRY City NEW CASTLE SSN 999-99-9999

State WY ZIP 88888-0000 Email anyone@serviceprovider.com Copy Demographics Race/Ethnicity

Mail

Same as Residence Address 123 ANYSTREET

City NEW CASTLE State WY ZIP 88888-0000

☒ Homeless

Date Verified 07/28/2003 Fixed Nighttime Location None ID Proof Immunization Records

Telephone 1 555-555-2081 Comment HOME Physically Present

Telephone 2 - - - - - Comment - - - - - Residency Proof Current Pay Stub

☐ Yes ☐ No Reason Not Present

Maiden Name

Last SHEET First GRETCHEN MI M ☐ Migrant

☐ Living with Foster Parent(s)

Clinic Assigned 01-Mother Child Center Staff Member Clinic Staff

Proof of identity is required for each applicant, participant, guardian, or proxy at each certification and food instrument issuance. Proof of identity will be documented on the demographic screen in MOWINS.

Once identity is proven and verified, visual personal recognition by the Local WIC Provider staff may constitute proof for subsequent certifications and food instrument issuance visits. Local WIC Provider staff must be careful to avoid discriminatory actions when using visual recognition. A comprehensive review of the proof of identity procedures is addressed in ER# 3.03850.

Proof of residency is required and must be implemented in a manner that does not constitute a

barrier to any applicant/participant, especially the homeless, military personnel, migrants, or other mobile populations. The type of document viewed to prove participant's income, identity and residency must be noted electronically in MOWINS.

With limited exceptions, an applicant or participant must reside in Missouri in order to be certified as eligible for WIC benefits. Residency is defined as the location or address where an applicant/participant routinely lives or spends the night and need not represent a legal residence. An applicant or participant is not required to be a U.S. citizen. Length of residency shall not be a prerequisite to receiving WIC benefits.

An individual who lives in a shared border state may be served in Missouri if they work or receive health care in Missouri. Local agency staff are required to take precautions to prevent dual participation by informing the applicant they cannot participate in both state's WIC programs.

The local agency must request documentation of residency from the applicant/participant and should inform the applicant/participant of the need for residency verification when scheduling a certification or recertification visit.

Acceptable proof of residency includes:

- A current utility bill, a rent or mortgage receipt for lodging/housing.
- An applicant with no proof of residency such as a victim of a disaster, a homeless individual, or a migrant must sign a statement attesting to his/her residency. In the situation where such a statement is used as the applicant's proof of residency, the WIC staff must place in the applicant's case file the statement and a brief notation explaining why the applicant could not produce proof of residency.
- A written statement from a reliable third party that has knowledge of the applicant's or participant's regular fixed or night time location. Reliable parties might include staff of a social service agency, church, legal aid society, or employer.

Acceptable proof of residency is addressed in ER# 3.01800, "Residence Requirements for Participants." Also addressed in this policy is the procedure(s) if the applicant/participant fails to provide proof of residency at their certification or recertification appointment.

Applicant or participant fails to bring the proper proofs - Appropriate proof of identity, residency and/or income must be provided within 30-days in order to ensure continued participation in the program if these were not provided at the original assessment. LWP staff shall select in MOWINS 'Proof Pending'. This will allow the staff to issue one-month worth of FIs to the participant.

When the applicant/participant has not yet provided appropriate proof of identity, residency, and/or income, the WIC local agency shall choose between two options listed below:

1. Inform the applicant/participant of the required proof needed and schedule another certification/recertification appointment within the regulatory time frames; **OR**
2. Allow applicant/participant to self-declare identity, residency and/or income, and screen for all other eligibility factors. If applicant/participant is determined to be eligible, they should be placed on cycle one food instrument issuance and issued one month of food benefits.
  - ❑ The local WIC agency staff must then inform the participant of the required proof needed and the final day to provide proof to ensure continuation of program participation and receipt of food benefits.

The local WIC provider (LWP) shall require that the person being certified or recertified be physically present at the time eligibility for the WIC Program is determined, with limited exceptions allowed. The local agency must document in the system (Demographic tab) whether the applicant or participant is physically present. If the applicant or participant is not physically present the agency is required to record the exception to the physical presence in the system, indicating the reason why an exception was granted. Refer to ER# 2.02700 "Physical Presence at Certification or Recertification" for details.

**Exceptions for Physical Presence:**

1. Infants or children who are receiving ongoing health care and/or working parents or caretakers. See policy for explanation.
2. If an applicant, participant, parent, or guardian has a disability that makes it difficult to come to the clinic for certification, or recertification, the applicant or participant may be certified without being physically present.
  - A newborn infant with medical complications.
  - A medical condition that necessitates the use of medical equipment not easily transportable.
  - A medical condition requiring confinement to bed.
  - A serious illness that may be exacerbated by coming into the clinic.
  - A highly contagious illness that may be readily communicated to others by coming into the clinic.

**Determining Income:**

In calculating the gross income of an applicant/participant, the Local WIC Provider may find it necessary to convert income received weekly, bi-weekly or semi-monthly to monthly or annual. Income is gross cash income before any deductions including income taxes, employee's social security taxes, insurance premiums, retirement, and any other deductions, such as bonds or garnishments. The Local WIC Provider shall select the appropriate radio button on the income screen indicating the participant's income source. As stated previously, the WIC local agency shall determine the applicant or participant income eligibility before performing health assessment procedures. Income eligibility must be assessed at each certification and recertification visit, and shall be based on gross income for household or economic unit for applicants or participants.

A comprehensive review of the income assessment procedures is addressed in ER# 3.02000 'Income Assessment and Documentation.'

**Income Calculator**

Previous Income Screening Contacts

- MICHELINA A. AARON
  - 05/15/1998 - \$0
  - 10/31/1997 - \$5,000
  - \$5,000/year
- SAKINAH AARON

**Adjunctive Eligibility**

☐ Food Stamps

☒ TANF

☐ Medicaid

☐ FDIPIR

☐ Other

☐ Pending Proof of Income

**Current Income Information**

Frequency	Description	Amount per Month

Household Size  Total Amount Per Month \$ 0

Income Calculator

**Add Income Line Item**

**Payment Frequency**

☐ Hourly
Amount per Hour \$ .
Hours per Week

☐ Weekly
Number of Weeks 
Amount per Week \$ .

☒ Monthly
Number of Months 
Amount per Month \$ .

☐ Bi-weekly
Number of Periods 
Amount per Period \$ .

☐ Semi-monthly

☐ Yearly
Amount per Year \$ .

Proof of Income 
Total Amount per Month \$0.00

Additional Info 1 Tab

Additional Info 2 Tab

Additional Info 2 Tab:

Authorized Representative Name The local WIC provider (LWP) shall allow woman participants and parents or caretakers of infant and child participants to designate a proxy or proxies to re-enroll an infant or child participant, obtain and transact food instruments, or receive supplemental foods, on behalf of the participant. A maximum of two active proxies may be designated for a household at any given time. The LWP will record the alternative representative/proxy name(s) in the Demographic (Additional Info 2) Screen in MOWINS. Individuals acting as a proxy must follow all program policies and procedures.

The LWP shall disallow any proxy that is less than sixteen years of age to obtain & transact food instruments, less than 18 years of age to re-enroll a minor in WIC, does not comply with program policies, or acts in any way that would constitute a participant violation. The LWP shall require proof of identity from a proxy, parent, or stepparent before issuance of food instruments

or undertaking any certification or health screening activities. Staff recognition is acceptable if proof of identity was previously established.

If the guardian wants to change her proxy designation, the guardian should complete and sign the proxy consent form or the alternate authorized rep. form (also titled as the re-enrollment of minor in WIC form) which are available as printed forms in MOWINS. The LWP will then update the alternative representative/proxy name(s) in MOWINS and the participant ID folder. Scan the signed form in MOWINS.

If the guardian wants to change her proxy designation and s/he is not present at the clinic, s/he can send a note with the new proxy name(s), the LWP will update the alternative representative/proxy name(s) in MOWINS and the participant folder. Scan the signed note in MOWINS. Local agency developed Proxy and Alternate Representative forms will **not** be allowed. After changing the proxy name(s) in MOWINS, the forms should be scanned into the participant's record. The proxy can sign the Rights and Responsibilities statement in MOWINS. The agency should verify the proxy names on the participant ID folder match the alternative representative/proxy names in MOWINS. The participant may change the proxy designation at any time. A comprehensive review of the guidelines related to proxies, as well as proxy responsibilities, is addressed in ER# 3.03800.

The Health Information Screen dialog contains three sub-tabs for collecting information about a participant. The Child Health Information dialog allows the user to enter health information about the infant or child participant.

The 'Child Health Information' dialog box is divided into three main sections: Birth Information, Mother's Information, and Feeding Information. The Birth Information section includes fields for Birth Weight (Lbs and Ozs), Birth Height (In and Oths), a checkbox for Premature Birth, Gestation Weeks, and a dropdown for Birth Facility. The Mother's Information section includes Birth Date, a checkbox for On WIC, and a State WIC Information section with ID and Name fields. The Feeding Information section includes Ever Breastfed (Yes, No, Unknown), a checkbox for Breastfeeding Now, Date Breastfeeding Verified, Amount of Breastfeeding, Date Breastfeeding Ended, Reason(s) Stopped (with a list of reasons like Anxiety, Lack of Confidence, etc.), Date Supplemental Feeding Began, and Date Solids Were Introduced. OK and Cancel buttons are at the bottom.

The Pregnancy Info tab of the Woman Health Information window allows the user to enter health information for a woman participant with a WIC Category of Pregnant. If the woman participant has a WIC Category of Breastfeeding or Non-breastfeeding and was certified as Pregnant for her most recent pregnancy, the information on the Pregnancy tab may be viewed but not be updated.

The 'Woman Health Information' dialog box, Pregnancy Info tab, contains sections for Current Pregnancy Information, Previous Pregnancy Information, Multivitamin Consumption, Cigarette Usage, Alcohol Intake, and Pregnancy History. Current Pregnancy Information includes checkboxes for Expecting Multiple Births, Planned C-section, and Has Not Received Prenatal Care, along with Expected Delivery, LMP Start Date, Date Prenatal Care Began, Pre-pregnancy Weight, Pre-pregnancy Height, and Age at Conception. Previous Pregnancy Information includes Number of Pregnancies, Number of Live Births, Number of WIC Pregnancies, Number of Pregnancies 20 or more Weeks, and Last Pregnancy Ended. Multivitamin Consumption includes Month Prior to Pregnancy and During Pregnancy dropdowns. Cigarette Usage includes Per Day - 3 Months Prior to Pregnancy, Per Day - Current, and Smoking Change. Alcohol Intake includes Drinks/Week - 3 Months Prior to Pregnancy and Drinks/Week Current. Pregnancy History includes checkboxes for Low Birth Weight, Premature Birth, and History of Fetal or Neonatal Loss. OK and Cancel buttons are at the bottom. A vertical label 'Pregnancy Info' is on the right side.

The Postpartum Info tab of the Woman Health Information window allows the user to enter health information pertinent to a woman participant with a WIC Category of Breastfeeding or Non-breastfeeding.

The screenshot shows a software window titled "Woman Health Information" with a tab labeled "Postpartum Info". The window contains several input fields and checkboxes. Under "Postpartum Information", there are fields for "Actual Delivery Date", "Hospital Discharge Date", "Birthing Facility" (a dropdown menu), "Weight Gained during Pregnancy", and "Weight at Delivery". Below these are checkboxes for "C-section Delivery", "On WIC during This Last Pregnancy", and "Did Not Receive Prenatal Care". There is also a "Date Prenatal Care Began" field and a label "Infant(s) Born from This Pregnancy". The "Cigarette Usage" section includes fields for "Per Day - Last 3 Months of Pregnancy", "Per Day - Current", and a "Smoking Change" dropdown. The "Alcohol Intake" section has fields for "Drinks/Week - Last 3 Months of Pregnancy" and "Drinks/Week Current". The "Pregnancy History" section at the bottom has checkboxes for "Low Birth Weight", "Premature Birth", and "History of Fetal or Neonatal Loss". At the bottom right of the window are "OK" and "Cancel" buttons. On the right side of the window, there is a vertical tab bar with "Postpartum Info" and "Pregnancy Info" tabs.

Postpartum Woman Health Information Screen

Stop and observe a staff member completing the Demographics, Income and Health Information screens in MOWINS.



### **Certification Periods**

Once an applicant has been screened and their eligibility determined, the system will generate the certification period based on the information provided. The certification period determines how long a participant is eligible for WIC benefits. Certification periods cannot be adjusted to give extra time to participants who miss scheduled recertification appointments. Review policy ER# 3.03500 Schedule of Certification Periods.

Stop and review the handout in Appendix A titled "Certification Periods."



## **Risk Factors**

To be eligible for WIC benefits, an individual must meet three criteria. First, they must meet one of five categories served by WIC: prenatal, breastfeeding (up to one year postpartum), non-breastfeeding (up to six months postpartum), infant, or child up to five years old. Second, the individual must meet the WIC income guidelines (financial eligibility) or be adjunctively

income eligible. Third, they must have a nutrition or health-related risk that is recognized and can be assigned by the Missouri WIC Program.

Risk factor (also known as risk criteria) refers to a nutritional/medical condition or a set of circumstances which can be identified through the certification process that indicate a person may be more likely to have a nutritional problem. The term “risk factor” is also used when referring to the specific risk factor number assigned to the risk factor condition. All applicable risk factors are based on standards used to determine if a WIC applicant or participant is at nutritional risk. The standards have been developed so that nutritional risks are defined uniformly throughout the state.

The Missouri WIC program uses a 3-digit risk factor numbering system for women, infants, and children. The WIC Certifier, CPA or Nutritionist is the authorized staff at the local WIC agency that determines whether an individual meets the criteria for risk factor assignment. Although the WIC Certifier, CPA, or Nutritionist determines which risk factors apply to an individual, all local agency staff should be familiar with the risk factors. In MOWINS, when a participant is considered high-risk you will see the yellow highlighted tabs across the participant’s folder view.

The screenshot shows the MOWINS software interface for a participant named KELLAN T ANDERSON, 3 months 12 days old, with WIC ID: 00565820 and Household ID: 00172650. The 'Risk Factors' tab is highlighted in yellow, and a callout box labeled 'High-Risk' points to it. The form includes fields for personal information, address, and medical history.

Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments
Demographics	Immunization	HT/wT/Blood	Food Prescription	Risk Factors	VENA

Participant Information:

- Last: [Field], First: [Field], MI: [Field], T: [Field]
- Birth Date: 8/1/2009, Gender: Male
- Address: 426 N FREDERICK APT 3, WIC Category: Infant
- County: CAPE GIRARDEAU, City: CAPE GIRARDEAU, State: MO, ZIP: 63701
- SSN: [Field]
- Copy Demographics, Race/Ethnicity: [Field]

Mail:

- Address: 426 N FREDERICK APT 3, City: CAPE GIRARDEAU, State: MO, ZIP: 63701
- Same as Residence: [Field]

Homeless:

- Date Verified: [Field], Fixed Nighttime Location: [Field]

ID Proof: Hospital or Other Records, Residency Proof: Utility/Personal Bill (Current)

Physically Present: Yes [Field] No [Field], Reason Not Present: [Field]

Maiden Name: Last [Field], First [Field], MI [Field], Migrant [Field], Living with Foster Parent(s) [Field]

Clinic Assigned: ADAIR COUNTY HEALTH DEPT, Staff Member: SYSTEM ADMIN

## Priority System

The priority system is a ranking system in which a (one-digit) number is assigned to a participant based on their category and applicable risk factor(s). The priority system is set up to assure that those persons at greatest nutritional risk receive WIC Program benefits in the event that funding is limited.

Currently, the Missouri WIC program serves Priorities 1 through 7, with Priority 1 being the highest of the seven priorities. The system automatically assigns each WIC participant a priority group based on his/her category and risk factor(s).

The screenshot shows the 'Applicant is Certified' dialog box. It displays 'Priority 3' circled, 'Certification End Date 11/30/2011', and checkboxes for 'Schedule Appointment' and 'Generate Certification Notice'. OK and Cancel buttons are at the bottom.

Applicant is certified to receive WIC benefits.

Priority 3

Certification End Date 11/30/2011

☒ Schedule Appointment

☒ Generate Certification Notice

OK Cancel

# Food Prescription

In addition to nutrition education and referrals to health care and community services, WIC participants also benefit from the nutritional supplemental food package they receive while participating in WIC. The food package provided by WIC is not intended to be the participant's main source of nutrition, but rather a selection of foods designed to supplement his/her already existing diet. The WIC Certifier, CPA or Nutritionist are the staff members authorized to "prescribe" the participant's food package.

**Certification Guided Script**

File Guided Script Help

Certification Guided Script

☐ [Demographics](#)

☐ [Health Information](#)

☐ [Height, Weight, and Blood](#)

☐ [Immunizations](#)

☐ [VENA](#)

☐ [Risk Factors/High Risk](#)

☐ [Referrals/Other Programs](#)

☐ [Nutrition Education](#)

☒ [Food Prescription](#)

☐ [Create SOAP Notes](#)

☐ [CPA Determined Follow-up](#)

☐ [Issue Benefits](#)

Household Member Information

☐ High Risk

Issuance Tri-monthly

Education

Education Method

Group Education

Risk Factor	Description
904	Environmental Tobacco Smoke Exposure

Major revisions to WIC food packages have not taken place since 1980. The changes were designed to improve the nutrition and health status of the nation's low-income pregnant women, new mothers, infants and young children. On October 2009, the New WIC: Food and Focus brought changes that better meet the needs of WIC participants. The new WIC food packages improve the health of participants, increase participants' choices, expand cultural food options, and offer fruits, vegetables, and other ethnic foods.

The educational message aligns with the 2005 Dietary Guidelines for Americans and is consistent with American Academy of Pediatrics and other professional infant feeding recommendations.

- ✓ Additional foods for exclusively breastfed infants and breastfeeding mothers.
- ✓ Introduction of supplemental foods at six months of age instead of four months of age.
- ✓ Modification of formula amounts based on the age of the infant.

## Focus on current public health issues

- ✓ Increased education on the selection of fruits, vegetables and whole grains.
- ✓ Stronger incentives for continued breastfeeding, including less formula for partially breastfed infants and additional quantities and types of food for breastfeeding mothers.

## The New WIC Focus

- ✓ The new foods are more consistent with the nutrition education messages provided to WIC participants:
  - Eat more fruits and vegetables,
  - Lower your saturated fat,
  - Increase whole grains and fiber,
  - Drink less sweetened beverages and juice, and
  - Babies are meant to be breastfed.

### Cultural diversity

- ✓ More participant choices, including tortillas, brown rice, soy-milk, tofu, canned salmon, and a wide choice of fruits and vegetables.

WIC provides participants with specific nutritious foods each month. Each food is chosen because it provides a certain set of nutrients or contributes to a healthy overall diet. WIC regulations tell us the specific foods and quantities each category of participant is eligible to receive each month. This combination of foods is called a food package. WIC usually gives the maximum quantity of available foods in order to provide the most nutrients needed by the participant.

The standard default food package for a participant is the food package that provides the maximum quantity of food in the most commonly used combination. The standard default food package will automatically be assigned to a participant by MOWINS unless the CPA selects a different food package. All participants must have a food package assigned in MOWINS. The authorized staff who can assign a food package are the WIC Certifier, CPA or Nutritionist. Only the CPA/Nutritionist can tailor a food package.

### *Prorated Food Packages*

MOWINS will calculate the number of days between the actual first date to use and the last date to use for the current set of checks being issued when determining prorated food packages.

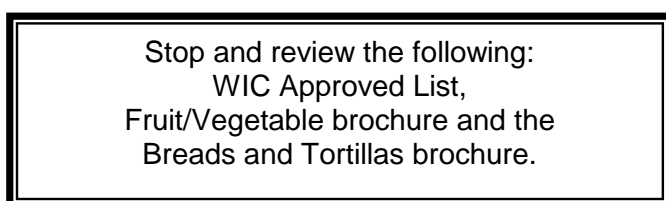
- ✓ Prorated food package for women and children: the issuance for milk and juice will be prorated as 1/4, 1/2, 3/4.
- ✓ Prorated food package for infants: the issuance for formula will be prorated as 1/2 or 3/4. A food package less than half is never issued.
- ✓ Other approved supplemental foods will be issued based on the participant's category and will not be prorated.

The CPA can override the proration to issue a full food package only if the participant reported having childcare problems, chronic family illness, rural residence, transportation issues, or work schedule which made it impossible for parents/guardian to keep their original appointment. Routine issuance of a full package is not recommended.

### **WIC Approved Food List**

The state WIC agency follows specific guidelines established by USDA federal regulations when considering foods to be made available through the Missouri WIC Program. Every two years, the state WIC agency conducts a review of all foods currently in use in the Missouri WIC Program. This periodic review assists in determining if changes, additions, or deletions are needed to the Missouri WIC Program approved food list. The State reserves the right to limit the number of foods for the WIC Approved Food List based on accessibility, availability and suggested retail store prices.

All foods provided through the Missouri WIC Program must meet the federal requirements for nutrients. The state WIC agency develops food packages according to these guidelines.



## **WIC Vendors and Their Role**

Contracted grocers and pharmacies (herein after referred to as the vendors) are an integral part of the success of the Missouri WIC Program in improving the nutrition and health status of women, infants and children. The vendor's role in the Program is to provide participants with only those foods issued on the food instrument, in the specified quantity, brand, size and type. This serves to provide participants with the specific nutrients they need and reinforce the nutrition education received.

The local agency will designate at least one WIC staff person to collaborate with the state Vendor Staff to assure adequate numbers of stores are available for their participants and that vendors have a local contact person for questions regarding food instrument issuance. The vendor coordinator's role is to serve as a liaison helping to disseminate important information to vendors in a timely fashion. They will document all contacts with stores regarding program related issues and complaints.

Who is the vendor coordinator in your agency? \_\_\_\_\_

## **Food Instruments**

Food instruments are WIC program checks used to obtain the supplemental foods. The food instruments should be generated following a participant's visit to the local agency, and must be redeemed only at WIC authorized vendors by the participant, parent/guardian of the participant, or an authorized proxy. Printed food instruments (also referred to as WIC checks) are specific to the participant, and list exactly which WIC approved foods the participant is entitled to, the unit/size, and the quantity issued (refer to the "Valid Only For The Purchase Of:" section of the WIC check). The participant will also receive a food instrument for purchasing fresh or frozen approved fruits or vegetables. The WIC participant will not be allowed to redeem food instruments for any foods that are not WIC approved or not listed on their WIC check. Food instruments should **never** be altered once printed.

The food instruments should be used on or after the "first date to use", but before the "last day to use." Missouri WIC vendors are authorized to accept food instruments only during this timeframe. When the food instruments are redeemed, the vendor will match the signature on the food instrument against the signature on the WIC participant identification folder (WIC-17).

Participants shall sign the food instrument in the presence of the vendor cashier as a witness after the transaction has been completed. Vendors have the right to refuse any transactions in which there is evidence of food instrument tampering or the cashier did not witness the signature on the food instrument. Vendors can also refuse transactions in which the signature on the food instrument does **not** match that on the WIC-17.

Stop and review food instruments regarding "first date to use," "last date to use." and the supplemental foods printed on the check.



## **Program Explanation to Participant**

The local WIC provider (LWP) shall provide an explanation of the Missouri WIC Program to the participant at certification or recertification. The purpose is to provide the participant with a clear understanding of the policies and procedures of the Missouri WIC Program. After eligibility

has been determined, the local WIC provider (LWP) clerical staff shall provide the participant with an explanation of program benefits and procedures.

The clerical staff shall check to see if the following items have been explained to the participant. If not, explain:

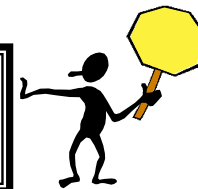
- The purpose and function of the program as a nutritional health care service, which provides supplemental foods.
- Health and community services and nutrition education that are available in the community. Encouragement of participation in these services.
- Foods on the food instrument that the participant will receive.
- The importance of picking up the food instrument each month.
- The importance of the foods being consumed by the participant, and not the entire family.

The clerical staff is responsible for explaining:

- The use and importance of the participant identification folder.
- Where food instruments can be redeemed in their county.
  - Find [local WIC provider stores](#) close to you.
- How to redeem food instruments.
  - Food instruments must be handled with care.
  - Food instruments are the responsibility of the participant, guardian or proxy and must be properly redeemed.
- Local program rules and regulations, especially those related to appointments and nutrition education.
- Illegal dual participation.

The clerical staff shall assure that the participant, parent, or legal guardian is aware of their rights and responsibilities before capturing the electronic signature. If participant is unable to read, staff shall read this portion of the form aloud to the participant.

Stop and observe a staff member providing the participant with their Rights and Responsibilities and collecting the participant's signature in MOWINS.



### **Participant Identification Folder (WIC-17)**

The local WIC provider (LWP) shall give a Participant Identification Folder to each participating household at the initial certification and replace the folder as needed. The LWP shall use the Participant Identification Folder to provide the participating household with pertinent WIC information. The LWP shall provide a current copy of the approved food list and instruct participants/guardians to keep in the Participant Identification Folder.

Stop and review ER# 3.03950 'Participant Identification Folder (WIC-17)'.



### **Notifying Participants of Expiration of a Certification Period**

At least 15 days before the end of the certification period, the local agency must give each participant notice that benefits are due to end. This notice ensures all participants have adequate time to adjust to the removal of program benefits. In cases where a participant may continue to be categorically eligible, the local agency shall schedule a recertification appointment for the month in which the recertification date falls.

When a participant is no longer categorically eligible, the local agency shall inform him/her that benefits will cease at the time the last set of food instruments is given. A comprehensive review of the procedures regarding notice of expiration of certification periods is addressed in ER# 3.03400.

### **Notification of Ineligibility or Termination (WIC-19)**

The Local WIC provider shall use the “WIC Notification of Ineligibility or Termination” (WIC-19) to provide applicants or participants with written notice of ineligibility or termination. The WIC-19 not only serves as a notice of Ineligibility/Termination of participation in the WIC program, but it also provides notice to the applicant or participant that they have a right to a fair hearing. A copy of the Official Notification of Ineligibility letter and the Right to a Fair Hearing letter should be kept in a central file for monitoring purposes.

### **Verification of Certification (VOC) and Transfers**

This transaction is used to allow participants who are still within a valid certification period to transfer to Missouri from another state. The applicant must bring a verification of certification (VOC) from the other state. Specific VOC forms brought to the agency by the participant or family should be checked for completeness. If the participant does not bring in a VOC the LWP staff shall call the state where the participant was receiving services to obtain a VOC. A listing of other State agencies can be found at: <http://www.fns.usda.gov/wic/Contacts/statealpha.HTM>

If the transfer is from another state WIC program, the following steps must be taken:

1. If the participant has a VOC for an active certification period, the LWP must complete a statewide search in MOWINS prior to entering participant(s) records in the system as a VOC Certification. Assign the same FI issuance cycle as stated in the VOC document. Scan the VOC in MOWINS and return the VOC to the participant or shred it.
  - a. The VOC must include the participant's name, nutritional/medical risk(s), certification of eligibility date(s), certification expiration date (recertification date), previous agency's name and address, and the name and signature of certifying official. The time remaining in the certification period from the other state is the time period that will be honored by Missouri WIC.
  - b. Once the certification period has ended, the participant is eligible to apply for recertification.
2. If the participant does not have a VOC for an active certification period, contact the previous agency to verify current certification and obtain the required VOC information. If the participant is in an active certification period, enter the participant(s) records in the data system as a VOC Certification. If the participant is not in an active certification period, treat the participant as a new participant.
3. If the participant has food instruments from another state WIC program, deface the FIs, and return them to the issuing agency.

The local WIC provider shall respond as soon as possible to a request for transfer from an active WIC participant or a WIC agency from another state. If a former WIC participant moved out of the state system and now has returned to the state and the certification period from the other state has expired, the transaction type would be considered a recertification.

The participant should inform the local WIC provider when leaving the service area so that the participant records can be prepared for transfer and a VOC provided when necessary.

To continue current program benefits and to prevent dual participation, Verification of Certification (VOC) shall be issued to any participant such as migrant farm workers or military personnel, who is or is likely to be relocating during an active certification period. The local WIC provider shall respond as soon as possible to a request for transfer from an active WIC participant or a WIC agency from another state.

Dual participation is defined as receiving and spending program benefits:

- More than once a month from the same LWP in Missouri.
- During the same month from two LWPs in Missouri.
- During the same month from a LWP in Missouri and a LWP in another state.
- During the same month from both WIC and the Commodity Supplemental Food Program (CSFP).

#### Participant transferring to another State WIC Program

A Verification of Certification (VOC) will be printed from MOWINS, signed by the LWP staff and given to the participant or mailed to the other state WIC agency if requested. The participant needs to authorize the release of their records if they wish them to be sent to another program. A copy of the signed authorized form/statement will be scanned in MOWINS. The participant is automatically terminated from MOWINS upon printing of the VOC.

#### Participant transferring to another agency within Missouri

The participant transferring from one agency to another agency in Missouri should receive service at the new agency in the same month in which the request was made, unless the participant has already received food instruments for that month. If the move is within Missouri, give the participant contact information for the LWP nearest to the new home. Include the LWP

name, address, and phone number.

If the participant has food instruments from the previous agency and they are not expired, the participant can keep and use the FIs. If the FIs are expired, take the FIs, deface them and void the FIs in MOWINS. The receiving LWP should e-mail the previous LWP that the participant transferred out of their agency. Include participant's name and state WIC ID number.

Stop and observe a staff printing a VOC for a participant who is transferring.



## Nutrition Education

The nutrition education component provided to all WIC participants or their parent/caretaker is what makes WIC a unique food program. Nutrition education shall be provided to all participants at no cost and documented appropriately. During each 6-month period, the adult participant, parent or caretaker of an infant or child (and the child himself when feasible), shall be given at least two nutrition education contacts which relate to the participant's risk factor(s), circumstances, and/or general nutrition needs. The LWP will ensure that every participant or caregiver receives nutrition education which emphasizes the relationships between proper nutrition and good health and assists the participant in achieving a positive change in food habits. Nutrition education contacts shall be provided individually or in a group setting by a CPA or Nutritionist.

If a participant misses or refuses a nutrition education session:

- The CPA or Nutritionist shall document the missed nutrition education contact in MOWINS when the participant or household misses for the entire month.
- Reschedule a missed appointment, as appropriate.
- Do not deny program benefits to participants who do not attend nor participate in nutrition education activities.

Only nutrition education-related materials and resources available through the Missouri Department of Health and Senior Services, or materials approved by the CPA or Nutritionist shall be available to WIC participants.

## Summary of the Clerical Role

Clerical and administrative staff are allowed to perform the following functions (Any one position may not include all of the duties listed):

- Prescreens applicants and assists in obtaining certification data such as demographics and income. Enters data on the appropriate screens in MOWINS. Reviews and documents proof of income, residency and identity.
- Assigns or retrieves Department Common Number (DCN) for individual applicant.
- Refers participants to social and community service programs.
- Explains participant rights and responsibilities and obtains signature.
- Prints and issues food instruments.
- Explains the program and how to use the food instruments.

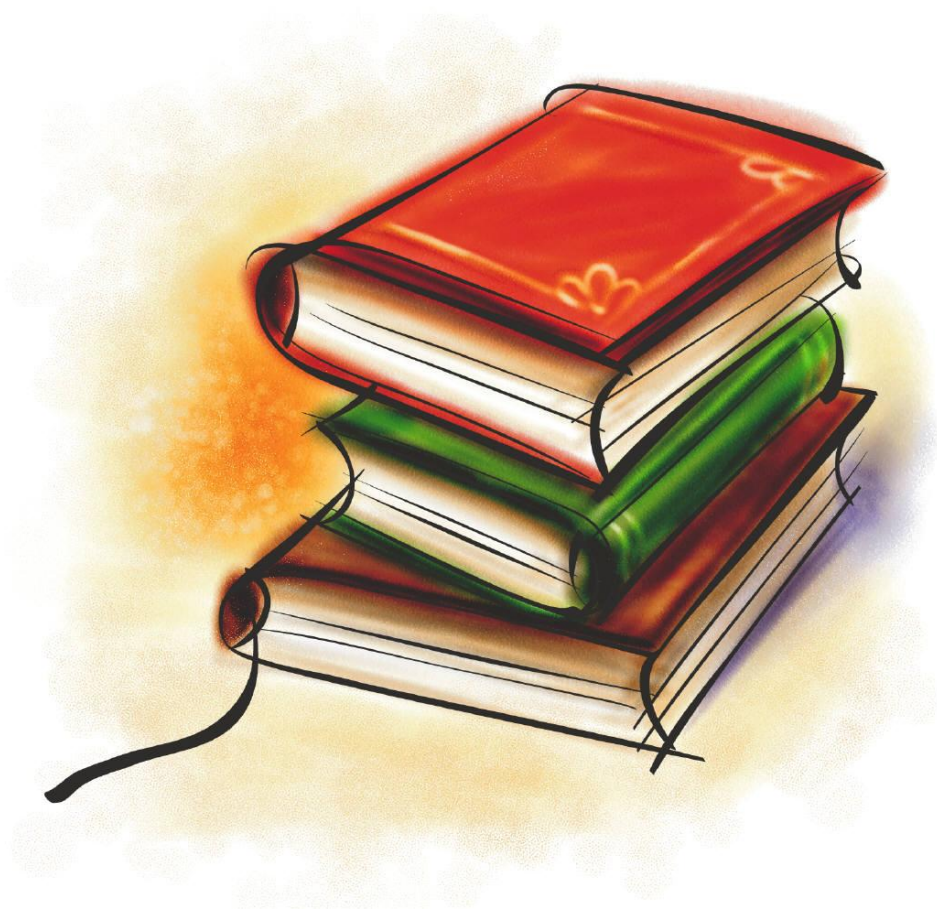
- Voids food instruments and reprints food instruments per CPA instructions.
- Schedules appointments.
- Prepares information for in-state and out-of-state transfer requests.
- Assists in the promotion and support of breastfeeding as the preferred method of feeding.
- Provides follow-up on no-show participants and reschedules appointments.
- Conducts outreach activities.
- Organizes files.
- Manages clinic flow, caseload and finances.
- Interviews participants regarding possible fraud or violations.
- Completes the administrative cost report.
- Completes one-on-one food instrument reconciliation.
- Acknowledges receipt of blank food instrument paper stocks and places order as needed.
- Retains and destroys records.
- Reviews and uses clinic and management reports.
- Participates in continuing education activities.

Clerical and administrative staff are not allowed to perform the following functions.

- Determine participant eligibility for WIC participants.
- Complete the VENA questions assign risk factors manually or determine cycle for follow-up.
- Develop nutrition care plans, provide nutrition education or enter nutrition education into MOWINS.
- Prescribe or tailor food packages.
- Counsel participants on health, medical and/or nutrition issues.

## **Appendix A**

### **Clerical**



# Missouri WIC Income Guidelines/ Reglas de Ingresos del Programa de WIC en Missouri April/Abril 1, 2011 – March/Marzo 31, 2012

Family Size/Tamaño De la Familia	Annual/Anual	Monthly/Mensual	Weekly/Semanal
1	20,147	1,679	388
2	27,214	2,268	524
3	34,281	2,857	660
4	41,348	3,446	796
5	48,415	4,035	932
6	55,482	4,624	1,067
7	62,549	5,213	1,203
8	69,616	5,802	1,339
9	76,683	6,391	1,475
10	83,750	6,980	1,611
11	90,817	7,569	1,747
12	97,884	8,157	1,883
13	104,951	8,746	2,019
14	112,018	9,335	2,155
15	119,085	9,924	2,291
16	126,152	10,513	2,426
Each additional family member/ Cada miembro adicional de la familia	Plus/Más 7,067	Plus/Más 589	Plus/Más 136

Pregnant women are counted as **two** family members. Income guidelines are based on 185% of poverty level. This institution is an equal opportunity provider. Cuentan a las mujeres embarazadas como dos miembros de la familia. Las reglas del ingreso se basan el 185% del nivel de pobreza. Esta institucion es un proveedor de igualdad de oportunidades!

# Missouri WIC Program

## Certification Periods—Recertification Schedules

### ER #3.03500

The certification period determines how long a participant is eligible for WIC benefits. A certification visit refers to the initial visit used to enroll or “certify” an applicant to receive WIC benefits. Recertification visits allow for re-evaluation of participants at scheduled intervals to check for changes in categorical, economic and nutritional/health status.

<b>Prenatal</b>	Recertification should take place following the last day of the month in which the infant turns 6 weeks old or the pregnancy ends (Ends 6 weeks after EDC).
<b>Breastfeeding</b>	Up to one year postpartum, or until the woman stops breastfeeding, whichever occurs first.
<b>Non-Breastfeeding or Miscarriage</b>	Non-Breastfeeding women are not eligible for recertification beyond six months postpartum, therefore, the end certification date must be shown as the last day of the sixth month after the baby is born or the last day of the sixth month after the pregnancy ends.
<b>Infant</b> Birth – 11 months	<p>Newborn to 6 months of age, shall be certified for a period extending up to the end of the month of the first birthday provided the quality and accessibility of health care services are not diminished. Recertification is due the month after the infant turns 1 year old.</p> <p>Infants older than 6 months old would be certified for the next six months and appropriate food package and status changes made at 1 year of age.</p>
<b>Child</b> 12 months to 59 months	Children are eligible for certification at six (6) month intervals. Exception: for the child who reaches the fifth birthday during the six (6) months, the child is terminated at the end of the month in which the child has the fifth birthday.